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ABSTRACT

This 1999 overview details the processes involved in trustee education and board development for the California Community Colleges. The paper argues that becoming an effective trustee and making positive contributions to the board requires ongoing education. The variety of strategies used by community colleges for orienting new trustees includes individual orientation sessions, college and program tours, and mentoring. In a 1998 survey of California boards, 75% reported holding a retreat at least once a year, 54% reported holding study sessions as part of board meetings, and 56% reported holding study sessions in lieu of board meetings. Virtually all districts in the survey used at least one of these three approaches, and many used more than one. This report offers a curriculum for trustee education, which covers the following topics: institutional knowledge and awareness; community college history, mission, and structure; community and region, including demographics and social, cultural, and economic influences; the Board of Trustees, including roles, responsibilities and laws; and trusteeship, including standards of practice and protocol. The overview also includes guidelines for CEOs and chairs' roles in trustee orientation. Sample plans, policies, and procedures from six California community colleges are provided. (Contains 14 references.) (NB)

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Local Trustees Orientation and Education

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Community College League of California

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Local Trustee Orientation and Education

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1999

Overview of Trustee Education and Board Development

Being elected or appointed to a community college governing board is only the first step in being a good trustee. Becoming an effective trustee and making positive contributions to the board takes time, thought, learning, and practice. Continuing to be a valuable member of the board requires ongoing education. Trustees and their colleges benefit when they make their own learning a priority. Research shows that effective boards place a high value on board education.

These materials are provided as a resource for local districts as they implement their own trustee education strategies. Boards and districts are different and should adapt the information to their own needs and circumstances.

Standards and Policies

The importance of education for trustees is underscored by the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges. An accrediting standard adopted in 1996 requires governing boards to have a program for new member orientation and governing board development. The Commission recognizes that effective boards enhance institutional quality, and that trustee education makes an important contribution to board effectiveness.

In a 1998 survey of district practices, approximately 30% reported that they have a written policy on trustee education. The policies often include the following concepts:

- A rationale for trustee education.
- Expectations that board members engage in ongoing education.
- A commitment to orienting new and student trustees. Some policies outline the orientation, who is responsible for it, and what should be provided.
- Encouragement to attend conferences and criteria for using conference and travel funds.

Examples of policies are included in the section "Sample Policies, Plans, and Procedures."

Program Development

Planning and developing local trustee education programs involves a cycle of needs assessment, goal setting, implementation, and evaluation. Individual trustees, the board as a whole, and/or a board committee participate in identifying needs for trustee education; however, CEOs and board chairs tend to have major responsibility for program implementation.

Designing a local trustee education program may be something done annually, perhaps in conjunction with a board self-evaluation or goal-setting session.

Needs assessment involves determining the learning needs of prospective, new, and continuing trustees as well as the board as a whole. There is a relatively standard "curriculum" of knowledge and skills for trustees and boards. The topics in the curriculum can be used to guide what board members and the CEO think is most important to address.

After assessing needs, the goals and learning outcomes of a trustee education program are identified. They state what knowledge and skill sets are expected as a result of the trustee education. Example of such statements are: "New trustees understand their roles and the role of the board;" "the board is aware of and understands educational trends affecting the community college mission;" "the board will enhance its effectiveness by seeking multiple perspectives from the community;" and "the board understands and abides by the Brown Act."

Individual trustees may have different learning goals and learning styles. Therefore, trustee education programs should be designed to allow individual trustees to engage in a variety of educational strategies. However, activities that involve the board as a whole are also important to build a common knowledge and skills base and to enhance teamwork. Implementing trustee education requires a flexible approach customized to both the needs of the board and the individuals who comprise the board.

Evaluating the effectiveness of trustee education can help guide the design of trustee education for the following year. Were the study sessions helpful? Is conference attendance a good use of district funds? What books or other resources provide the best information? What did trustees learn? How did trustee education affect the functioning of the board? Evaluation questions such as these help determine what strategies should be used in the future.

What Trustees Learn

Trustees who are effective in their role have both sophisticated governing skills and comprehensive knowledge about the district and community. New trustees are faced with the challenging task of absorbing much new material about their districts and their roles. Continuing trustees also work to refine their skills and to stay current with trends and issues.

Sophisticated governing skills include understanding the unique role of a governing board, focusing on policy, and working as one member of a unit. Effective trustees also understand the implications of representing and integrating multiple perspectives of the stakeholders. They explore the difference between policy and procedure and seek to focus on broad policy levels. They practice good communication and interpersonal skills and have respect and appreciation for various points of view on the board.

Having comprehensive knowledge means that trustees understand the current and future learning needs of their communities, are aware of the history and culture of the college, and comprehend education trends and issues. Being effective also means being comfortable with technical information, such as laws and regulations, budget and financial summaries, and institutional effectiveness and other research data reports.

New trustees report that their major learning needs are:

- Their policy-making role
- Monitoring without micromanaging
- Listening and staying objective
- Working as a unit

- Building trust and teamwork with the board and CEO
- Influencing board decisions
- Fiscal issues and budgets
- Shared governance
- Brown Act and other legal constraints
- Role of community colleges
- Linking with and representing the external community

More detail is provided in the section, "A 'Curriculum' for Trustee Education."

How Trustees Learn

Like all adults, trustees learn in a variety of ways. They learn best when:

- they have control over the learning experience,
- learning is problem-centered,
- what they learn has immediate application, and
- there are opportunities for interaction and discussion.

Therefore, trustee education programs should allow for self-direction and be customized to the schedules, needs, and preferred learning styles of individual trustees. While there is a common core of knowledge that all trustees should have, different trustees will select what they need to learn and will learn it in different ways. So, a variety of opportunities should be available, although all approaches should include time to discuss questions, principles, and applications.

Interviews with new trustees confirm that there are many different ways they learn. Some learn best by reading; others by individual meetings with the CEO, district administrators and other leaders; and others by attending the Trustee Orientation Workshop and other conferences. Continuing trustees and CEOs report that board retreats and study sessions are also extremely valuable in maintaining currency. Each of these strategies is described in more detail below.

Trustee Education Strategies

Reading and the Web

There is a vast amount of reading available about trusteeship and educational trends and issues in periodicals, books, and on the Web. An annotated list of resources is included in these informational materials and in the League's *Trustee Handbook*. The challenges for trustees are to determine which resources are best, organize them, and find the necessary time to study them.

The League's *Trustee Handbook* is considered very helpful as a learning tool or resource, particularly for trustees in their first term. About one-third of the districts report having local trustee handbooks in addition to the League's. Local handbooks tend to contain the board's policies on its operations and practices, as well as general district information (see "Local Trustee Handbooks" for more detail).

District documents are an important source of information for all trustees. Accreditation self-studies and visiting team reports provide a comprehensive review of programs and improvement efforts. Strategic, educational and facilities master plans describe the direction for the college and contain the all-important mission, vision, and goal policy statements.

New trustees gain a sense of the college history, programs, and culture by reading college catalogs and schedules. Minutes and agendas of past board meetings help them become acquainted with board practices and priorities.

The World Wide Web can be a rich source of information. The League's web page (www.ccleague.org) is being designed to contain basic information about trusteeship from the *Trustee Handbook*, announcements of opportunities for trustee education, and links to other informative sites.

Candidate Education

Learning trustee roles and responsibilities starts when individuals are recruited for or indicate an interest in becoming board members. Candidates and potential candidates should know what the expectations and constraints are for the position. Incumbent candidates and others running for office should be treated equally in terms of receiving information and invitations to engage in the following strategies:

Candidate education takes place through:

Forums or meetings with potential candidates. The CEO's office and groups within the college may sponsor informational sessions about board service; distribute informational materials to community groups to solicit interest from community leaders; and invite potential candidates to attend board meetings and to meet with the CEO, board and other campus leaders.

Early contacts by the CEO. As soon as the filing period is completed, the CEO should send an informational packet to all candidates. The Community College League provides some materials for an informational packet, including "So You Want to Be a Community College Trustee," introductory chapters on the community colleges and trustee roles and responsibilities from the *Trustee Handbook*, and the *Community College Profile.* Districts also provide general information about the local district, such as annual reports, strategic plan summaries, and examples of board meeting agendas and minutes.

Meetings with candidates. All candidates should receive an invitation to meet with the CEO to discuss board roles and current and future issues. Group sessions or individual meetings may be scheduled, depending on the candidate needs and number of candidates. Other college leaders, including board members, may also be involved.

New Trustee Orientation

Once someone is elected to the board, learning starts in earnest. New trustees rate the Community College League's Trustee Orientation Workshop offered each winter as one of their most valuable learning experiences. The League also offers a student trustee orientation in late

summer. The workshops are a day and a half each, and cover board roles and responsibilities as well as educational, legal, and fiscal policy roles.

Local orientation programs are essential. The CEO is the major contact for new trustees, along with board chairs. Orientation is an ongoing process involving reading, individual meetings, college and program visits, experienced trustee "mentors," and participation in ongoing trustee education.

The major purposes of local trustee orientation are to provide new trustees with a sense of the history, traditions, and culture of the colleges in the district; knowledge of their policy roles and responsibilities; and an overview of district programs and services. A variety of strategies are used by colleges:

Individual orientation sessions. The most common component of local trustee orientation is a series of sessions for the new trustee with the CEO, the board chair, and senior administrators. Some districts also arrange introductions to faculty, classified staff, and student leadership groups. These sessions are usually scheduled throughout the first few months of a new trustee's term. They educate trustees on board operations, policies, and the college programs and services, and provide ample opportunity for the new trustees to ask questions and learn protocol.

College and program tours. Other common components in local new trustee orientation programs are scheduled tours of the college and arranged visits to educational programs and services.

Mentoring. Experienced trustees are a source of wisdom and information, and mentoring of new trustees often occurs naturally. Some districts assign a mentor from the board to initiate contact and attend events with new trustees (See "Mentoring Guidelines").

Retreats and Study Sessions

In a 1998 survey of California boards, 75% report holding a retreat at least once a year, 54% reported holding study sessions as part of board meetings and 56% reported holding them in lieu of board meetings. Virtually all districts in the survey use at least one of those three approaches – many use more than one.

As with all board meetings, retreats and study sessions are subject to the Brown Act and must be noticed, open, and accessible to the public.

Next to conference attendance, board retreats are considered the most valuable strategy to provide ongoing learning. Retreats generally are workshops that range from a half-day to a day and a half. They are often held in comfortable, informal surroundings designed to promote open exploration and discussion. The most common retreat topics are boardsmanship, governance, board self-evaluation, planning and goal setting.

Study sessions are generally a half-day or evening session and may look more like a board meeting. Study sessions are conducted on a wide variety of topics – most often on the budget, college plans, educational programs, and facilities.

A number of districts find that arranging joint workshops with other boards is valuable. Periodic meetings of regional consortia allow opportunities to explore and be educated about regional issues and establish a climate for collaboration among districts. Workshops with boards from districts with similar characteristics (small, rural, urban, or multi-college) also provide for sharing policy ideas and exploring common issues.

Conferences

Conferences, seminars, and workshops are major learning opportunities. They provide an opportunity to hear about and discuss important educational policy trends and issues, policies and practices of other boards and districts, and principles of effective boardsmanship. The conferences rated as most useful are those sponsored by the Community College League and the California Community College Trustees. Conferences sponsored by the Association of Community College Trustees (ACCT) and the American Association of Community Colleges also are valuable and provide a national perspective. See the section, "Events, Resources, and Readings."

Getting the most out of conferences is an art, particularly those that are not targeted solely for trustees. Trustees often have to filter presentations that are targeted to practitioners through their perspective as policy leaders. They must ask what the implications are for their roles as trustees.

Time and Resources

Being an effective trustee requires a commitment of time by the trustee, CEO, and board chair, and by the institution as a whole. Trustees estimate they spend from two to ten hours per week reading materials, keeping up-to-date, and attending meetings. Conferences and board retreats require additional time. Board chairs and CEOs have even more responsibility to stay up-to-date on trusteeship issues. They spend even more time planning and implementing orientation and ongoing education programs, as well as meeting their other responsibilities to their boards.

Board and trustee education is a worthwhile investment in board and institutional effectiveness. Funds are needed for travel, conferences, reading materials, consultants, retreat facilitators, and access to information technology. District budgets for trustee conference and travel range from $1,000 to $35,000. In large districts, the average budget is approximately $16,000; in mid-size districts, approximately $13,000; and in small districts, about $8,000 (1998 survey).

Role of the Board Chair and CEO

The president of the board is the leader of the board and plays an important role in planning and encouraging participation in trustee education activities. The chair:

- Welcomes new trustees and participates in their orientation
- Assesses the needs for trustee and board development
- Helps plan retreats and study sessions for the board
- Participates actively in trustee education activities
- Encourages all trustees to attend conferences and seminars

- Asks for reports and evaluations of trustee development activities.

The CEO plays a key role and generally has the responsibility for implementing a trustee education program after the board plans one. In fact, although the CEO is employed by the board, the CEO is usually relied on as the teacher and/or *de facto* leader of the board. CEOs are expected to keep the board informed, and ensuring that trustees take advantage of opportunities for growth and development is one way CEOs fulfill that responsibility. Boards and institutions benefit when CEOs:

- Ensure that there is a program or plan for board education
- Provide information to candidates
- Design and conduct a new trustee orientation, involving the board
- Develop a comprehensive packet of district materials or local trustee handbook
- Plan retreats and study sessions in consultation with the board
- Encourage trustees to attend conferences and accompany them to events
- Invite trustees to community and college-wide events
- Are alert to opportunities for trustee learning
- Ensure trustees receive information on current trends and issues.

Summary

New challenges arise quickly, issues are increasingly complex, resources are limited, demands on colleges are increasing, and decisions are not always easy. Trustees are only successful if they continually seek information, are open to new ideas, and engage in ongoing education. Boards will improve their own effectiveness if they have plans and policies for trustee education that:

- Addresses individual needs, wants, and learning styles
- Provides opportunities for discussion and problem-solving
- Includes a variety of strategies, such as reading, Web access, conference attendance, retreats, study sessions, and mentoring.
- Is fully supported by the CEO and board chair
- Has adequate financial support.

By being actively involved in ongoing trustee education, a board becomes a model for the entire institution. Boards engaged in learning foster an environment for learning in their organizations. A strong investment in board education pays dividends for the entire institution.

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A "Curriculum" for Trustee Education

Trustees need comprehensive knowledge about the community, the district and its educational programs, board roles, and trusteeship skills in order to be effective. The list of topics and activities below is a sample "curriculum" for new trustee education and ongoing trustee education. It is based on a review of local trustee handbooks and orientation programs, a survey of district practices, and interviews with new trustees.

Topics for New and Student Trustee Orientation

Institutional Knowledge and Awareness

- District and college mission, history and culture
- District and college organization
- Educational programs and services
- District budget, budgeting processes, constraints, and resources
- Plans, major issues, and trends
- Campus layouts, off-campus sites, and facilities plans
- Summaries of institutional information and data
- College publications and websites
- Rosters of trustees and key college personnel
- Summaries of staff demographics
- Shared governance processes and rationale
- Collective bargaining processes and contracts

What New Trustees Say What Was Most Important to Learn . . .

- Their policy-making role
- Fiscal issues and budgets
- The Brown Act and other legal conditions
- The role of community colleges
- How to listen and staying objective
- How to work as a unit
- How to build trust and teamwork with the board and CEO
- How to influence board decisions
- How to monitor without micromanaging
- How to engage in "shared governance"
- How to link with and represent the external community

Community Colleges

- History and mission of community colleges
- Structure of higher education in California
- State and national policy issues and trends
- Implications of Education Code and Title V

Community and Region

- Demographics and related trends
- Relationships with other educational institutions, local governments, and business
- Social, cultural, and economic influences
- Locally-elected officials
- Key community groups
- The foundation and its relationship to the board

The Board of Trustees

- Concept of board as a unit
- Board roles and responsibilities
- Related laws and regulations
- Board policies
- Structure and operations of the board, including basic parliamentary procedure
- The Brown Act; board meeting agendas and minutes
- Relationships with and support from the CEO and board secretary

Trusteeship

- Code of ethics or standards of praetices; conflicts of interest
- Communication protocols with staff and the community
- Working as a team; collaboration; influence
- Trustee perquisites and constraints
- Education and training opportunities
  - Conferences, seminars, and workshops
  - Recommended reading and other informational resources

Topics for Ongoing Education

Governing Boards and Trusteeship

- Approaches to effective board governance
- Board policy review and development
- Community links and representation
- Board self-evaluation processes and criteria
- Setting and achieving board goals
- Collaboration, teamwork, and conflict management
- Effective meetings and agenda construction
- Ethics and standards of practice

Educational Policy Trends and Issues

- Collaboration and partnerships
- Competition in higher education
- State and national legislative and public policy proposals
- Accountability and institutional effectiveness
- Community, regional, state, and global trends and issues
- Technology
- Distance learning and other alternatives to traditional delivery
- Faculty, staff, and student roles and trends
- Laws and regulatory changes

Institutional Programs, Trends and Issues

- Collaboration with the community, business, and industry
- Governance practices, including shared governance
- Strategic and long-range planning

- Educational programs and services
- Institutional effectiveness and program review
- Accreditation
- Fiscal projections and conditions
- Facilities needs and planning
- Employee contracts and negotiation process

A trustee education "curriculum" should be designed to meet individual learning styles and needs. The outcome of the curriculum is that the governing board is effective and consists of individual trustees who bring comprehensive knowledge and skills to their policy-making responsibilities.

Trustee Orientation: A Checklist for CEOs and Board Chairs

Chancellors, superintendents and governing board presidents play very important roles in orienting new trustees to their roles and responsibilities as board members. The following checklist is designed to help develop an effective trustee orientation program.

Step 1. Contact and Orient Candidates

As soon as the CEO knows who has filed for election or appointment:

___ Send or personally deliver an information packet to all candidates. Include:

- The League's *Board Candidate's Information*, which includes a list of the Trustee Orientation and other pertinent conferences
- Selected chapters from the League's *Trustee Handbook* including "Governing Board Role" and "The California Community College System"
- The League's *California Community College Pocket Profile*
- General information about the district
- District policies about the board (code of conduct, meetings, responsibilities, privileges and benefits).

___ Invite all candidates to one or more of the following:

- A candidate information forum about the district and the board's role and responsibilities
- Individual or group meetings with the CEO
- Tours of the college(s)
- A group meeting with the current board chair and/or other trustees
- Board meetings held prior to the election to observe and be introduced.

___ Treat all candidates the same, including incumbents.

Step 2. After the Election or Appointment

___ Inform the League of the results of the election or appointment. New trustees will receive a welcome letter, educational materials, and will be added to the mailing lists.

___ Arrange for new trustees to attend the League's Trustee Orientation Workshop in Sacramento, and also plan to attend the workshop.

___ Design a series of orientation sessions for the new trustee(s).

- Schedule information and discussion sessions with or introductions to:
  - The board chair
  - Experienced board members
  - The CEO (all presidents in multi-college districts)
  - Vice presidents or vice chancellors to review their areas
  - Faculty, staff, and student leaders.
- Discuss shared governance processes and guidelines for communicating with staff.
- Encourage new trustees to read and discuss the League's *Trustee Handbook* and board policies and practices.
- Schedule campus tours and visits to major programs.
- Respect and honor individual differences of opinion, learning styles and backgrounds.

___ Provide comprehensive information about the board and district. Identify the documents that merit expeditious review. Help new trustees set up an information filing system. Common documents are:

- Board policy manual
- Board ethics, procedures, and responsibilities (if not part of the policy manual)
- Local board handbook (if any)
- Strategic and master plans
- Accreditation reports
- Annual reports
- Institutional effectiveness summaries
- College catalog
- Personnel policies

___ Consider assigning or offering a "mentor" from the board .

- Use experienced trustees who will be able to gain the confidence of the new trustee.
- Offer assistance and feedback on board culture and boardsmanship – not opinions on how to vote.

___ Help new trustees strengthen their links to the external community and publics.

- Arrange for invitations to new trustees to community events or meetings with key community people. Be sure they are introduced as new trustees.
- Invite them to attend a Foundation board meeting
- Provide information about trends and educational needs in the community
- Provide information about the college to help new trustees be knowledgeable representatives.

___ Maintain ongoing communication links.

- Board chairs and "mentors" initiate contact.
- Encourage new trustees to ask questions and seek information prior to board meetings. Offer to meet with them prior to board meetings for the first few months.
- Discuss lines of communication and who to ask for what information.
- Ask new trustees what their preferred mode of communication is. Use that style to the extent practical.
- Set up an e-mail address and include them in routine communication.
- Call new trustees before board meetings to see if they have any questions.

___ Encourage new trustees to seek educational opportunities.

- Notify them of all upcoming state and national conferences (particularly those sponsored by the League and ACCT).
- Establish an expectation for new trustees to attend conferences; explain how to obtain travel support.
- Strengthen partnerships and teamwork by arranging for the CEO and/or other board members to accompany new trustees to conferences and introduce them to others.

New trustees have varied learning needs and styles, backgrounds, motivations for being on the board, and schedules and desires for learning opportunities. Therefore, local orientation to the trustee position will be different for each new trustee. However, the time and effort involved in providing a substantive overview and discussion of the district and trustee roles and responsibilities will reap future benefits. The time and effort will help new board members be well-informed and participate effectively in the unit that is the board.

New Trustee Learning Guide

Becoming a member of a governing board for one of California's community college districts is an important and challenging responsibility. Successfully serving as a trustee requires dedication, time, and education. New trustees may use the following checklist as a guide to learn about their unique roles and duties on the governing board.

Learn about Trustee Roles and Responsibilities

- Attend the annual Trustee Orientation Workshop sponsored by the League. (This event has been rated by new trustees as one of the best ways to learn about their job.)
- Peruse the League's *Trustee Handbook* to become aware of the contents. Carefully read Sections 2 and 3 on governing board responsibilities and effective trusteeship.
- Read the local district trustee handbook, if the district has one.
- Study the board's policies on the governing board, particularly the code of ethics or standards of practice for the board.
- Meet with the chancellor or superintendent/president, board chair and other members of the board to discuss trustee roles and responsibilities.
- Seek out someone from the board to use as a resource or mentor.
- Discuss with the CEO and other trustees the difference between policy making and management.
- Be aware of the legal and ethical constraints on trustees, including open meeting provisions, confidentiality, conflicts of interest, and role in collective bargaining.
- Plan to attend state and national conferences for trustees.

Learn about the District's Programs, History and Culture

- Work through the CEO to arrange to talk with key people about major programs and accomplishments of the district.
- Arrange to tour the college(s).
- Peruse the college catalog, accreditation self-study and team report, key planning documents, and annual report.
- Know the district and college mission, vision, and policy goal statements, and the board's policies related to educational programs and services.
- Read about the history of the college. Plan to attend major district events, such as convocations, opening days, and graduations.
- Read about the California Community Colleges in Section 1 in the League's *Trustee Handbook*.

Learn about External Trends and Issues

- Read local newspapers and listen to the news for trends that might affect the college.
- Strengthen links with key people and groups in the communities served by the college. Attend community events. Listen for issues that are pertinent to the college.

- Read about local demographic and economic trends that affect the college.
- Read about state legislative, fiscal, and other policy issues that affect the colleges.

Learn about District Planning Processes and Budgets

- Working through the CEO, meet with appropriate people to explore the policy goals in the strategic and master plans.
- Meet with the appropriate personnel to review the policy aspects of the budget, its parameters and restrictions, the process for developing the budget, its relationship to strategic and master plans, and how the board monitors the fiscal health of the district.
- Read Section 4, Policy, Planning and Monitoring, and Section 7, Fiscal Responsibilities, in the *Trustee Handbook.*

Learn about Board Meetings and Board Operations

- Review past agendas and minutes.
- Thoroughly read the agenda for each meeting.
- During the first few months, don't hesitate to call or meet with the CEO, mentors or other trustees, and/or the board chair before each meeting to seek clarification on agenda items.
- Become knowledgeable about basic parliamentary procedures and other practices related to participating in effective meetings.
- Be willing to observe and learn for the first few months to understand how things have been operating. Call the board chair or CEO when there are questions.
- Understand the key conditions of the Brown Act (open meetings law). Read Section 8, Legal Responsibilities, in the *Trustee Handbook.*

Practice Good Human Relations Skills

- Get to know other members of the board as individuals.
- Learn and respect communication protocols with other trustees, the CEO, and staff members.
- Work to be a member of the board team. Wisely contribute ideas and opinions.
- Read sections 5 and 6 on relations with the CEO and staff, and section 3 on board effectiveness in the *Trustee Handbook.*

Rely on the Following Resources

- The Chancellor or Superintendent/President.
- The board chair and other experienced trustees.
- The Community College League of California/California Community College Trustees

Learning is never-ending. Trustees who engage in ongoing education about their roles, responsibilities, and important issues are outstanding models and policy leaders for their colleges.

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Board Retreats, Study Sessions, and Community Links

Study sessions and board retreats are one of the most commonly used strategies for ongoing board education. Out of 57 California districts that responded to a 1998 survey, 75% held retreats at least once a year, 56% held study sessions in lieu of board meetings, and 54% held study sessions during board meetings. Virtually all districts used at least one of those strategies for board education. (The survey did not ask districts to describe their community links.)

This document provides some guidelines for holding successful retreats and study sessions, based on the aforementioned survey.

Retreats

Purpose: To provide an informal environment in which trustees, the CEO, and perhaps other members of the leadership team can explore issues related to board and institutional performance and planning. Official action is rarely taken, although direction and recommendations may be developed for action at a future meeting.

Retreats also provide an opportunity for trustees and others to become acquainted on a more personal and informal basis, which can promote teamwork and collaboration.

Content: Common topics are board self-evaluation, boardsmanship, and governance, as well as planning, envisioning and goal setting for the board, CEO, and/or district. Boards and CEOs also use retreats to design a search process for a new CEO, conduct the CEO evaluation, discuss board/CEO relations, review board policies, and become informed about district operations, foundations, and fundraising. Almost any topic that benefits from open and informal discussion and exploration is suitable for a retreat.

Length: Three hours to 1½ days, depending on the topic(s) and availability of board members.

Location: Retreats are often held off campus. If the boardroom is used, the room is generally arranged in a more informal fashion. (Note: The Brown Act applies to retreats and requires that all board meetings be in the district and fully accessible. Joint sessions with other districts for the sole purpose of board education may be held out of district, since they are not board meetings.)

Preparation and Format: The agenda for a retreat usually lists the topic(s) to be addressed, which are usually determined by the board chair and CEO after consultation with the board. Background materials on the topic(s) are distributed prior to the retreat. There may be an initial presentation related to the topic followed by discussion, or a list of items may be presented for discussion.

Most districts use outside consultants to facilitate retreats at least occasionally. This allows all members of the board and the CEO to participate equally by freeing them from the responsibility to conduct the discussion. The *League on Call* service from the Community College League will provide retreat facilitators.

Study Sessions

Purpose: Study sessions are designed to inform the board about a specific topic and allow sufficient time to ask questions, raise issues, and discuss alternatives. Usually, no action is taken, although recommendations and directions may be identified for action in the future.

Study sessions are particularly useful when the board will need to make a major decision in the future. Thoroughly reviewing proposed programs or projects well in advance of decisions being made ensures that the board can give careful thought to the issues and that the staff is aware of board concerns and questions early in planning processes.

Content: Study sessions held *in lieu of* board meetings most often focus on the budget, followed by planning and shared governance. Other topics may include facilities and capital outlay, staffing needs and projections, reorganization or restructuring, board evaluation, new trustee orientation, policy reviews, technology, collective bargaining, student profiles and demographics, accreditation, and reports on major college initiatives and programs.

Study sessions held *as part of* a board meeting tend to be on internal district operations and educational policy trends and issues. The most common topics are the budget and fiscal issues; goals and planning; educational programs, program review, and the curriculum. Other common topics are facilities and capital outlay; future trends, vision, and mission; student profiles and services; technology and distance learning; and collective bargaining and negotiation approaches. Policy, shared governance, CalWorks, accreditation, legislative initiatives, legal constraints, funding and funding alternatives, and personnel policies are all additional examples of topics. Boardsmanship and board evaluation may be dealt with as part of a board meeting, although these are more often topics for a separate board session.

Length: The time allocated for study sessions generally ranges from 1 – 3 hours, depending on whether the session is scheduled as part of or in lieu of a board meeting.

A number of districts that traditionally meet twice a month use one meeting a month for a business meeting and one for a study session.

Location: Study sessions are generally held in the boardroom or at a location relevant to the topic. Seating arrangements may need to be changed to accommodate multi-media presentations.

Format: Study sessions usually involve a presentation by college staff members, the CEO, or experts in a particular area, followed by questions and discussion from the board and others as appropriate. They are usually conducted by the board president.

Community Conversations

Purpose: A relatively new approach to board education and planning is holding structured conversations or workshops that involve representatives from the external and college communities in exploring a specific topic. The conversations are to help boards link with those

on whose behalf they act, and help colleges connect in a positive way to the publics they serve. The conversations provide an opportunity to seek common understanding of issues and different perspectives and to identify priorities for further exploration. Boards and organizations become better equipped to establish policy direction and make policy decisions.

Content: Since the purpose is to involve community representatives in discussions with college leaders, the topics are usually those related to the mission and goals of the district; demographic, social and economic trends related to education; and major policy issues within the district. Community conversations are very useful early in a strategic or long-range planning process when the board is involved in setting the overarching policy direction.

Length: Well-structured community conversations are 2 – 3 hours.

Location: The location depends on the number of people involved. It should allow for both large group and small group interaction.

Formats: There are a variety of formats to conduct conversations such as these, all of which include a well-defined structure, ground rules that promote productive participation, advance preparation to identify key issues, small group discussions and interactive exercises, and follow-up reports.

The Maricopa County Community College District in Arizona has written a guide for conducting what they call "Strategic Conversations." The "Great College" format is a useful approach and can be used with all types of groups (contact the League for more information). The charrette approach and workshops that incorporate focus groups have been successfully used.

No matter what approach is used, community conversations require a leader or facilitator, staff to do the advance and follow-up work, and skilled small group discussion leaders.

Mentoring New Trustees

Effective mentors are wise, loyal advisers who teach and coach less experienced people. Trustee mentors coach new trustees in their roles and responsibilities and make it easier for new trustees to quickly learn their jobs. They are also open to new learning experiences and opportunities in their roles as mentors.

Mentors are often invaluable in helping new trustees understand the history and culture of the governing board and relationship with the CEO. They provide a safe environment in which new trustees can ask questions and seek guidance.

Mentoring Practices

In a 1998 survey of local trustee education practices, about one-third of the respondents reported providing formal or informal mentoring for new trustees (including student trustees) when they first came on the board.

Most mentoring involves trustee-to-new-trustee mentoring. An experienced trustee volunteers or is appointed to be a mentor for the newly elected or appointed trustee. A board may have a written policy that mentors are appointed or the board may have a practice of identifying a mentor when new trustees join the board.

Board presidents are often in a mentoring role due to the position they hold. Since they are responsible for the effective functioning of the board, they may play a larger role than other trustees may in welcoming, coaching, and integrating new trustees into the board team.

Chancellors and superintendent/presidents also play a mentoring role when a new trustee comes on the board. The CEO is an invaluable source of information about the district, effective board practices, and how to influence board decisions. Successful CEOs dedicate a great deal of time to talking with and answering questions from their new trustees.

Informal mentoring occurs when new trustees identifies someone with whom they feel comfortable and seeks advice and counsel from that person. Informal mentoring may occur across districts – some new trustees are more comfortable talking with a trustee from a neighboring district or with trustees who hold state leadership positions. New trustees also seek advice and counsel from League staff members and others who work with trustees.

Mentoring is not necessarily limited to one person. Any one of or all of the people listed above may act in a mentoring capacity, beginning when a trustee is elected or appointed and continuing throughout a person's time on the board. What is important is that new trustees feel comfortable with the mentor, trust his or her advice, and know that the mentor has their best interests at heart.

Successful Mentors

The best mentors are truly interested in helping others succeed. Ideally they are trustees (or those who thoroughly understand the role) with the following qualities:

Exemplify high standards of trusteeship

Mentors are visionary, ethical, proactive, future-oriented, and positive. They know how to focus on broad policy, support the college, and contribute to a strong board/CEO relationship. They seek the "common good" rather than self-interest.

Have excellent human relations skills

They are good listeners and provide clear advice in a non-critical, direct manner. They understand interpersonal dynamics and how to work successfully in a group. They handle conflict well and exhibit civility, respect, and confidence.

Model a thirst for knowledge

Effective mentors have active and inquiring minds and are always learning. They attend conferences and workshops, read broadly, and are active in the community. They are models for continuously seeking to be a better trustee and governing board member.

Have time to be available to new trustees

They spend the extra time that is needed to contact, meet with, and go to conferences and other events with the new trustee.

Guidelines for mentoring

Successful mentors:

- Initiate contact with new trustees and make themselves available for questions and concerns
- Have as the highest priority new trustees' success on the board
- Get to know new trustees' background, interests, and assumptions about the role
- Encourage new trustees to attend conferences and accompany them to the Trustee Orientation Workshop and other trustee conferences during the first year
- Help new trustees identify what is most important to read and understand in the information they receive
- Recommend resources for learning
- Identify how to get things done as well as situations to avoid
- Invite new trustees to community events
- Introduce new trustees to key people in the community
- Ensure that the new trustee has good communication links with the CEO, the board secretary, and other members of the board
- Practice what they preach (have effective trusteeship skills).

Successful mentors don't:

- Try to influence new trustees' votes or sway them to a particular point of view on issues
- Monopolize the new trustees' time and attention
- Wait for the new trustee to initiate contact
- Talk too much.

Identifying and Using Mentors

Steps in identifying and using mentors in trustee orientation:

1. Consider developing a policy or written statement encouraging mentoring or the involvement of experienced trustees.

2. Identify mentors or experienced trustees.
   - "Official" mentors should meet the above criteria
   - Encourage informal mentoring and assistance
   - Contact the League for names of experienced trustees in nearby districts who are willing to share their insights and expertise

3. Establish expectations for mentors.
   - Discuss the guidelines and standards for successful mentoring
   - If the student trustee's advisor is someone not on the board, ensure that the person understands the roles and responsibilities of trustees

4. Support mentors
   - Allocate conference and travel funds for the mentor to accompany new trustees to workshops or conferences
   - Evaluate the effectiveness of mentoring during the board self-evaluation process

Mentoring is only one strategy in a comprehensive program to orient new trustees to their roles and responsibilities. It adds a personal, customized component to assisting new trustees become contributing, influential members of the governing board team.

Local Trustee Handbooks

The Community College League of California annually publishes a comprehensive *Trustee Handbook* that covers board and trustee roles and responsibilities and provides other information. The *Trustee Handbook* is distributed at the annual Trustee Orientation Workshop and mailed to newly-elected and appointed trustees.

A number of districts substitute or augment the League's *Handbook* with a local trustee handbook or board book. The scope and contents vary between districts; the sample table of contents below was compiled from a number of handbooks.

Sample Table of Contents

1. *Board Responsibilities*
   Policies and other statements that cover board operations and roles, including:
   a. Board philosophy and purpose
   b. Responsibilities of the board and individual trustees
   c. Communication lines and protocols
   d. Ethics and standards of practice
   e. Board meetings
   f. Board agendas and how they are developed
   g. Trustee compensation and benefits
   h. Legal responsibilities
   i. Student trustee rights and privileges
   j. Board orientation and education
   k. Conference and travel opportunities and expenditure guidelines
   l. Board self-evaluation process and criteria

2. *Chief Executive Officer*
   a. Job description
   b. Annual goals
   c. Evaluation process and criteria

3. *Calendars*
   a. Board meetings and retreats
   b. Conferences of interest
   c. Budget, planning, and reporting calendars

4. *District Information*
   a. District history
   b. District and college mission, vision, values and goals
   c. Summaries of strategic, master, and educational plans and description of planning process

5. *Shared Governance and Committee Structure*

6. *Budgeting Criteria and Assumptions*

7. *Personnel and staff relations*
   a. Trustee and key staff contact information
   b. Organizational charts
   c. Collective bargaining process
   d. Communication protocols

8. *Organizations and Agencies*
   a. Regional consortia
   b. Community College League and CCCT boards
   c. National associations

9. *Parliamentary Procedure*

10. *Maps*

Districts

Of the 57 districts that responded to a League survey, 18 checked that they had a local trustee handbook. The League has a table of contents or sample of the handbook from the following colleges.

- Chaffey
- Foothill-DeAnza
- Marin
- Monterey Peninsula
- Mt. San Antonio
- Santa Monica
- Solano
- Ventura
- Yosemite

Events, Resources, and Reading

Conferences and Workshops

Annual League Convention

The Annual Convention is held each November and brings together trustees, administrators, staff, faculty, and students to discuss educational programs and issues.

Trustee Orientation Workshop

The Trustee Orientation Workshop reviews the art and nature of trusteeship and is designed for new and experienced trustees alike. It is sponsored by the League and held in conjunction with the Legislative Conference in late January or early February.

Annual Legislative Conference

The Legislative Conference is held every winter, and brings together trustees, administrators, faculty, staff and students to learn about major legislative trends and issues, as well as to advocate for community colleges with their legislators.

CCCT Annual Conference

The annual conference for trustees and CEOs is held in late spring to strengthen board effectiveness and discuss educational issues related to the board's policy role.

Student Trustee Workshop

The workshop for student trustees is held every August to orient new student trustees to governing board roles and their responsibilities as board members.

Other important conference and workshops for trustees include those sponsored by the Association of Community College Trustees (www.acct.org), and other national organizations.

League on Call Consulting Service

The League on Call consulting service provides facilitators and workshop leaders for retreats, workshops, and study sessions involving boards and CEOs and/or leadership teams. The services are customized to meet the needs of local districts and include such topics as the art and nature of trusteeship, team building, board self-evaluation, planning and goal setting, CEO evaluation, and policy development. To arrange for the service, contact cjsmith@ccleague.org.

Organizations and Web Sites

Community College League of California
2017 O Street, Sacramento, CA 95814
916-444-8641 Fax 916-444-2954
www.ccleague.org

The League represents and serves the trustees and CEOs of California's community colleges by providing professional development programs for trustees and CEOs, advocacy, research and policy analysis, publications and reports, and financial services.

The website includes some publications, current information on legislation and education policy proposals, California Community College Directory, conference and meeting information, financial services and links to related web pages. Trustee and CEO educational information is being added to the web site.

Association of Community College Trustees (ACCT)
1740 'N' Street, NW, Washington, DC 20036
202 -775-4667 Fax: 202-223-1297
www.acct.org

ACCT represents and serves community college trustees in the U. S. and Canada. It publishes periodicals, books, and special reports. The website includes current information on legislative and public policy issues, special projects, conferences and meetings, and educational materials for trustees.

American Association of Community Colleges (AACC)
One Dupont Circle, NW, Ste. 410, Washington, DC 20036
202-728-0200 Fax: 202-293-7050
www.aacc.nche.edu

AACC represents community and technical colleges in the nation and promotes, supports, and advances the cause of its member colleges. It provides leadership through policy initiatives, advocacy, research, education services, and coordination with other higher education organizations.

Association of Governing Boards of Universities and Colleges (AGB)
One Dupont Circle, Ste. 400, Washington, DC 20036
Phone: 202/296-8400
www.agb.org

AGB represents and provides services to higher education governing boards, with a particular focus on public and private university boards. It sponsors conferences and retreat services, conducts research and policy initiatives, and publishes *Trusteeship* and *Priorities*, as well as other books on trusteeship.

Other websites of interest

Most of the web pages listed above have links to related websites, including the following:
www.academicsenate.cc.ca.us Academic Senate for California Community Colleges

www.cccco.edu	California Community College Chancellor's Office
www.league.org	The League for Innovation in Community Colleges
www.ncnb.org	National Center for Nonprofit Board
www.gseis.ecla.edu/ERIC	ERIC Clearinghouse for Community Colleges

Periodicals

The Community College League publishes the following periodicals, which are mailed to trustees, CEOs and other campus leaders and posted on the Website:

The News – published four times a year, the News covers programs and issues in the colleges.

League in Action – published twice a year, the League in Action updates member colleges on the activities of the League and its organizations.

Board Focus – Published three times a year, *Board Focus* contains articles on trusteeship and governing board roles.

Advisor. Association of Community College Trustees, Washington, DC. The *Advisor* contains news of ACCT activities and positions.

Trustee Quarterly. Association of Community College Trustees, Washington, DC. Published up to four times a year, this magazine includes articles on trusteeship and the board's role in emerging issues in the colleges.

Community College Journal. American Association of Community Colleges, Washington, DC. Published bimonthly, it highlights colleges across the country and explores educational trends and issues.

Trusteeship. Association of Governing Boards, Washington, DC. The magazine includes articles on trusteeship and higher education trends and issues. It is also available on AGB's website.

Board Leadership. Jossey-Bass Publishers, San Francisco. Published six times a year, this periodical discusses the application of Policy Governance principles to governing boards.

Publications

The following League publications are targeted specifically to governing boards and their CEOs. Unless otherwise indicated, the materials are available by contacting the Community College League of California.

Community College Pocket Profile

Published every two years, the pocket profiles contains comprehensive statistics and other information on California's community colleges in an easy-to-read format. It is available for purchase from the League.

Trustee Handbook

Thirty-nine short chapters on topics related to being a member of a California community college governing board. It is updated annually and provided to all who attend the Trustee Orientation Workshop. It is also sent to all newly elected and appointed trustees. Additional copies are available from the League.

Board Focus

An educational periodical mailed to all trustees and CEOs, published three times a year. Recent copies are posted on the Website. Inquiries from trustees and CEOs who are willing to write articles are welcomed. For topics and guidelines for authors, please contact Ray Giles, raygiles@ccleague.org.

So You Want to be a Community College Trustee

A brochure designed for candidates for the governing boards. Copies are mailed each July to those districts holding elections in the following fall, along with other materials helpful to those interested in running for the board.

Resources for Board Self-Evaluation

This packet of information includes articles on board self-evaluation, sample criteria and forms, and suggestions for board self-evaluation processes.

Resources for CEO Evaluation

This packet of information includes articles on CEO evaluation, suggestions for processes, and sample criteria and forms.

Resources for Board Ethics

This packet of information includes articles on board ethics and standards of practice, sample codes of ethics, and worksheets for developing a board policy.

Resources for CEO Search

This packet of information includes the steps involved in conducting a CEO search, and lists search consultants and districts that have conducted searches in recent years.

Orientation and Education for California Community College Trustees

This publication describes the components of trustee education programs and includes resources to help local boards design their programs.

Student Trustees

This packet of information includes a description of their legal rights and privileges, a paper on the differing perspectives on the role, advice to student trustees from student trustees, and a survey of district practices.

Books

The following books are excellent resources for trustees and are recommended for inclusion in a trustee library. There are many other books on organizational effectiveness, leadership, and social and educational trends that are also important to trustees.

Block, Peter. *Stewardship.* San Francisco: Berrett-Koehler, 1993.
Stewardship models replace traditional concepts of leadership and management. Organizations that practice steward will succeed by choosing service of self-interest. Individuals who see themselves as stewards will choose responsibility over entitlement and hold themselves accountable.

Carver, John. *Boards That Make a Difference.* San Francisco: Jossey-Bass, 1990.
The theory and principles of the Policy Governance model are described. The model proposes a role for boards that is proactive and future-oriented, rather than reactive and focused on internal operations.

Carver, John, and Mayhew, Miriam. *A New Vision for Board Leadership.* Washington, DC: Association of Community College Trustees, 1994.
The Policy Governance model is summarized and applications to community college boards described.

Carver, John, and Miriam. Reinventing Your Board: A Step-by-Step Guide to Implementing Policy Governance. San Francisco: Jossey-Bass, 1997.
The Policy Governance model is described, steps for implementation are proposed, and sample policies included.

Chait, Richard P., Holland, Thomas P., & Taylor, Barbara E. *The Effective Board of Trustees.* Phoenix, AZ: American Council on Education. Oryx Press, 1993.
A study of governing board in higher education results in six dimensions of board effectiveness being identified. The dimensions or skill sets are strategic, contextual, interpersonal, educational, analytical, and political.

Chait, Richard P., Holland, Thomas P., & Taylor, Barbara E. *Improving the Performance of Governing Boards.* Phoenix, AZ: American Council on Education, Oryx Press, 1996.
This book builds on their previous one by exploring how boards can improve their effectiveness and competence on the six dimensions.

Cohen, Arthur M. and Brawer, Florence B. *The American Community College.* San Francisco: Jossey-Bass, 1989 (Second Edition).

A comprehensive and scholarly review of the history, mission, organization, programs, and issues and trends in community colleges.

Fisher, Roger and Ury, William. *Getting to Yes: Negotiating Agreement Without Giving In*. New York: Penguin Books, 1991 (Second Edition).
The concepts and strategies of win-win negotiation and mutual gains bargaining are explored in this classic book.

Gardner, John W. *On Leadership*. New York: The Free Press (Macmillan, Inc), 1990.
This classic book describes essential components and characteristics of leadership.

Haynes, Marion E. *Effective Meeting Skills*. Los Altos, CA: Crisp Publications, 1988.
How to run and participate in effective meetings are explored in this easy-to-read workbook.

Houle, Cyril. *Governing Boards: Their Nature and Nurture*. San Francisco: Jossey-Bass, 1989.
This classic book on governing boards describes their roles, responsibilities, and conditions for effectiveness.

Ingram, Richard P. and Associates. *Governing Public Colleges & Universities*. San Francisco: Jossey-Bass, 1993.
Twenty-two contributors offer authoritative advice to both new and seasoned trustees and CEOs. While much of the book is oriented to baccalaureate-level institutions, some will be helpful to community colleges as well.

Kerr, Clark and Gade, Marian L. *The Guardians: Boards of Trustees of American Colleges and Universities*. Washington, DC: Association of Governing Boards, 1989.
A survey of over 2000 trustees and CEOs of higher education institutions helps define effective boards and conditions that lead to board effectiveness.

Vaughan, George, and Weisman, Iris. *Community College Trustees*. Washington, DC: Association of Community College Trustees, 1997.
The results of a comprehensive study of community college trustees are reported and offer insight into trustee roles, rewards, and challenges, as well as the major issues in the years ahead.

Sample Policies, Plans, and Procedures

The Accrediting Commission for Community and Junior Colleges requires that governing boards have a program for new member orientation and governing board development. In a survey, approximately 30% of districts report having a written policy on trustee education – others may have an informal or formal plan, but have not adopted it as policy.

Examples of policies from a few districts are provided below. Some policies address orientation for new and student trustees. Other policies are contained in the board's code of ethics or standards of good practice. Still other statements encourage attendance at conferences and outline criteria for trustee conference and travel funds.

Orientation

Foothill-DeAnza

Board Policy 9110.1 Student Trustees

Training

- The student trustee shall, within the first two weeks of being appointed, make arrangements to meet with the out-going student trustee, the student activities director, the college president, the chancellor and a trustee mentor mutually agreed to by the student trustee and the board president.
- The outgoing student trustee shall be responsible for the handing over of the CCLC student trustee handbook, updating the new student trustee on any outstanding business, and giving an overview of the role of the student trustee.
- The student activities director shall be in charge of communication training and parliamentary procedures
- The college president will give an overview of the college mission and schedule regular meetings
- The chancellor or his/her designee will be responsible for familiarizing the student trustee with administrative policies and procedures, understanding of board structure, general operational principles of the board as well as the student trustees' rights, responsibilities and privileges.
- The student trustee should attend the Community College League of California student trustee orientation or similar activity

Hartnell College

Policy 1440 Orientation for New Board Members

The Governing Board shall develop an orientation plan for new Governing Board Members. The Superintendent/President has established, in consultation with the Board, procedures for the orientation. These procedures are located in the Office of the Superintendent/President.

Procedures to Accompany Board Policy 1440

1. Superintendent/President provides new board members with copies of all important documents regarding policies and procedures, organizational structure, . . . strategic planning, governance procedures and other important and current issues.

2. The director of human resources and staff diversity reviews . . .. issues related to campus personnel and affirmative action, benefit plans available to the board, and policies and procedures for reporting related economic interests.
3. An orientation /review session is coordinated by the Superintendent/President in which an attorney reviews legal aspects related to the campus and governing board policies and procedures. The board is also briefed on upcoming or recent changes in legislation that may affect board policy. The vice president for administrative services reviews the campus budget and other fiscal issues. Other college administrators review issues critical to their areas.
4. A two-day working session is held in which a consultant is brought in to discuss board procedures and protocol.
5. New board members attend the Community College League of California Trustee Orientation Workshop and Legislative Conference in Sacramento.

Lake Tahoe Community College

Policy 1.07 Orientation for New Board Members

A. Publicly Elected Board Members

The Superintendent/President and the Board shall assist each new member-elect to understand the Board's functions, policies and procedures before the assumption of office. Such assistance will include the providing of written materials, invitations to attend Board meetings and conferences with the Superintendent/President. New Board members shall be encourage to attend meetings held as training/information sessions on a regional basis by other organizations.

B. Student Board Member

1. The Superintendent/President shall provide an overall orientation to the student Board member upon assumption of office to include the providing of written materials; an overall review of the institution's history and development; the structure of public higher education at the state level; an explanation of the concept of consultation; and an invitation to schedule additional meetings with the Superintendent/President. The Superintendent/President will encourage the student trustee to attend the new student trustee orientation sponsored by the California Community College Trustees (CCCT) association.

2. In June of each year the President of the Board of Trustees shall appoint a member of the Board of Trustees to act as mentor to the student trustee.

Regulation 1.07 Orientation

[Note: The regulations at Lake Tahoe Community College are not reproduced verbatim due to space limitations. The regulations define about who is responsible for orientation and what is included in orienting new people to the institution and trusteeship. Highlights are:]

Providing orientation:

- The Superintendent/President and two to three experienced trustees have the responsibility for the orientation. The CEO assumes the primary responsibility for offering guidance to the board in planning and implementing the program with the help of carefully selected trustees, senior administrative officers, and the board chair. Participation by members of the board is necessary if the program is to be credible.

- The orientation needs to make the important distinction between orientation to the institution and orientation to the new Board member's trusteeship.

- Since the needs of each new trustee may vary, the CEO may inventory the personal and professional interests and experiences of each incoming board member to permit tailoring the program accordingly.

The orientation to the institution includes:
- Walking tours of the campus and off-site class locations
- Institutional data review
- College history and development, and college catalog
- Lists and contact information for trustees, college personnel, and student leaders
- Structure and operations of board of trustees
- Structure of higher education at the state level
- Briefings on organization, programs, budget, and facilities of the college
- Shared governance
- Board policy manual; board meeting agendas and minutes
- Affirmative action plans
- Printed college materials
- Opportunities to meet informally with campus leaders and faculty, staff, students, administrators, and fellow trustees
- Support from CEO and Administrative Assistant for Board

Orientation to trusteeship includes:
- Roles of board and of individual trustees
- Books and videotape resources
- Attendance at local, state and national meetings, including the League's Trustee Orientation Workshop and Legislative Conference
- Review of pertinent laws and board policy manual

Palo Verde College

Policy 7041 Orientation – New Board Appointments

An orientation session shall be scheduled for new Board of Trustee appointees. A special meeting of the Board for the purpose of the orientation shall be called within 30 days of the appointment of a new trustee. Planning and implementation of appropriate information items for the orientation shall be the joint responsibility of the Superintendent and current members of the Board of Trustees.

The Superintendent/President and the Board shall assist each new member-elect to understand the Board's functions, policies, and procedures before he/she assumes office. Such assistance shall include, but shall not be limited to, providing written materials and invitations to attend Board meetings and conferences with the Superintendent/President. New board members shall be encouraged to attend meetings on a regional basis held as training/information sessions by other organizations.

Pasadena Area Community College District

Board Policy 1040 Orientation of New Board Members

Immediately upon election to the Board of Trustees, each new trustee, including the student trustees, shall be assigned a mentor from the Board of Trustees. The mentor shall be appointed by the Board President and confirmed by the Board. This mentor shall be available during a period of 30 days after the election to meet with and to confer with the newly elected trustee and shall participate in the orientation sessions. As a general rule, after each election, the mentor shall act as such to one new trustee and in no event shall act as mentor for more than two of the elected new trustees.

The Superintendent/President should conduct an orientation for each new trustee, including the student trustee, within two months of election to the board. This orientation should include a tour of the main campus and of the Education Center and shall include sessions with the Superintendent/President and with representatives of the board, the faculty senate, the classified staff senate, the management association, and associated students.

Prior to the orientation session the following materials should be provided to the newly elected trustee:

[The policy lists seventeen items, including maps, board meeting materials, planning documents, accreditation reports, contracts, demographic information, budgets, laws, board policies.]

During the orientation sessions the following topics should be addressed:

[The policy lists eleven items, including trustee roles and responsibilities; CEO, board, and staff relationships; communication procedures; legal and fiscal responsibilities, board structure and organization; trustee benefits; board protocol and standards of conduct.]

Santa Monica College

Board Policy/Board Operations 8030

Orientation: Elected Trustees/Student Trustee

The board of trustees, the Superintendent/President, and the staff shall assist each new member-elect/appointee to understand the board of trustees function, policies, and procedures before he/she takes office. The following methods shall be employed:

- The electee/appointee shall be invited to meet with the Superintendent/President and other administrative personnel to discuss services being performed by the board of trustees.
- The electee/appointee shall be notified of board of trustees meetings prior to his/her taking office officially. The Superintendent/President or designate shall supply material pertinent to meetings and shall explain its use.
- The electee/appointee shall be given selected material concerning his/her responsibility as a member of the board of trustees.
- A copy of the board of trustee policies and bylaws shall be given to each new member by the Superintendent/President.
- The electee/appointee shall be invited to meet with members of the board to review board meetings, policies, and the general performance expected of all board members.

Ongoing Trustee Education

Some colleges have either specific policies on trustee education and/or statements in their codes or ethics or standards of practice that trustees shall be committed to seeking and engaging ongoing education. Excerpts from policies and ethical codes are listed below; complete policy statements are available from the League or the district.

Chaffey College

Board Policy 1.2.9 Seminars

On occasion, the Governing Board may meet informally (as a committee) to discuss various school or educational issues with the Superintendent/President and staff members. These meetings will be known as "seminars"; and since they are not official sessions, no action can be taken. These meetings are open to any who wish to attend unless otherwise specified.

Foothill-DeAnza

Code of Conduct

To assist the Board of Trustees in achieving its goals, the following code of conduct shall be adopted. The board member shall:

- Remain informed and participate in community college trustee organizations that will keep each member abreast of state and national trends and issues;
- Be knowledgeable about the District's mission, purposes, goals, policies, educational programs, strengths, and needs;

Responsibilities and Effective Board Practices

- Responsibilities of the Board of Trustees . . .

To be informed. Trustees need to understand how California community colleges operate. The trustees need to know about the District, its history, mission and goals, programs, finances, physical assets, students, major problems, future prospects. Through a process of mentoring with other board members and through the chancellor, new board members will acquire this information. Trustees also need to know the issues facing community colleges in general, particularly as they affect the district. This information comes from reading state and national publications and by attending regional state and national meetings.

- Responsibilities of the President of the Board (or designees) . . . .

To provide appropriate orientation and training for new Board members.

Santa Monica College

Board Policy/Bylaws of the Board 9413

Board of Trustees Retreat(s)

The Board of Trustees shall hold an annual Board of Trustees retreat between the second Saturday in January and the second Saturday in February. The date shall be set by the Board at the organizational meeting in December. The retreat may be for the following purposes:

1. Orientation for new members of the board

   If there are new board members, they will be familiarized with board processes/procedures and presented with general college information. In addition the board will review the *Board of Trustees Orientation Handbook* so that questions and any revisions may be discussed.

2. Board discussion

The board will have the opportunity to discuss individual concerns and ideas with other members of the board and the administration. Discussion topics may include, but not be limited to, proposed administrative plans, board policies/goals, future agenda items, agenda format, et cetera.

Other retreats may be scheduled as needed.

Code of Ethics
A member of the board of trustees . . .. devotes time, thought, and study for effective participation and contribution in the decision-making process of the Board.

Yosemite Community College District

Code of Ethics
In carrying out the mission of the Yosemite Community College District, the Board of Trustees is committee to the following standards of ethics . . . . .

- Board members should avail themselves of educational opportunities in order to become more effective trustees.

Hartnell Community College District
Board Training and Development Program
Proposal
In an effort to respond to the ever-changing demands of the board's responsibility for wise and prudent management of education and the responsibility for guiding the community college district to meet its mission and serve creatively its ever-changing communities, it is important that we develop a series of training session designed to enhance the board's ability to carry out its major fiduciary and moral responsibilities.
Recommended Training
[The plan lists eight areas, including Policy Governance, Brown Act, board self-evaluations, board goal setting, board/CEO relations, Affirmative Action, effective board meetings, and fundraising.]
Action Steps
1. Form small work groups to dialogue on the training of the board
2. Develop a series of training sessions to prepare the board for its continuous role
3. Review the CarverGuide model as the basis for current and future training needs
4. See approval of the board for adoption of a recommended board training program

Resources
- League on Call
- Association of Governing Boards
- ACCT
- Local consultants on specific issues

U.S. Department of Education
Office of Educational Research and Improvement (OERI)
National Library of Education (NLE)
Educational Resources Information Center (ERIC)

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